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News Release

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SageView's Randy Long, Jeff Petrone, Stephen Popper and Jonathan St. Clair Named as Delegates to NAPA DC Fly-In Forum

IRVINE – Four SageView representatives recently participated as delegates to the National Association of Plan Advisors' (NAPA) Annual DC Fly-In Forum, an exclusive gathering of the nation's leading retirement plan advisors.

SageView's Founder and CEO Randy Long, Managing Director Jeff Petrone, Managing Director Stephen Popper and Chief Fiduciary Officer Jonathan St. Clair were among the delegates who converged to the NAPA DC Fly-In Forum in the nation's capital to listen to and brief top congressional leaders about the impact and importance of the nation's workplace retirement plans, and, as advocates for the employers and participants they work with, shared how proposed laws and regulations might impact American workers' retirement security. Mr. Long, Mr. Petrone, Mr. Popper and Mr. St. Clair are members of NAPA, and were four of approximately 200 delegates selected to participate in the sixth annual NAPA DC Fly-In Forum July 24-25.

This year, NAPA DC Fly-In Forum delegates heard from Congressman Richie Neal (D-Massachusetts), and Senator Todd Young (R-Indiana), both of whom have recently introduced legislation that would impact retirement plans, as well as Assistant Secretary of Labor Preston Rutledge and Securities and Exchange Commissioner Hester Peirce, key figures in recent developments regarding considerations pertaining to a fiduciary standard. Panel discussions with key Hill staffers shed light on prospects for legislative reforms, and delegates also gained insights on litigation trends and new retirement policy proposals, followed by a dinner keynote address featuring a perspective on the mid-term elections from CNN Chief National Correspondent John King.

Randy Long commented, "SageView is proud to have had four representatives at this year's important event, discussing retirement policy and pending legislation that will give more Americans access to quality retirement plan services."

On the second day of the forum, delegates met one-on-one with their respective congressional representatives on Capitol Hill to share insights from the experiences they have on a daily basis with business owners and plan participants – and to provide perspectives on proposed and current legislation.

"We met with Congressman Joseph Kennedy of the 4th District of Massachusetts about the RESA bill and the good that this will do to help increase retirement savings coverage for 40 million American workers. RESA has many positive provisions including an incentive for employers to set up 401(k) plans and for smaller unrelated employers to come together and join Multiple Employer 401(k) Plans," added Stephen Popper.

In order to participate in the NAPA DC Fly-In Forum, delegates were required to be a NAPA member; to be responsible for \$100M+ in plan assets, 10+ plans and 2,000+ participants; and to have at least five years of experience servicing retirement plans.

The National Association of Plan Advisors was created by and for retirement plan advisors. Membership is also open to other retirement industry professionals who support the interests of plan advisors. NAPA is the only advocacy group exclusively focused on the issues that matter to retirement plan advisors. NAPA is part of the American Retirement Association. The American Retirement Association, based in the Washington, D.C. area, is a non-profit professional organization established to educate all types of retirement plan professionals, and to preserve and enhance the employer-based retirement plan system as part of the development of a cohesive and coherent national retirement income policy.

About SageView Advisory Group

SageView Advisory Group is an SEC Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans. SageView is headquartered in Irvine, California with 23 offices nationwide.

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